



National Association for Employee Recognition

2002 BEST PRACTICES

A Summary Report Discussing the Daily Application
of Best Recognition Practices at CalPERS & TELUS

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INTRODUCTION

The National Association for Employee Recognition (NAER) is dedicated to the advancement of recognition in the workplace. To help set standards of employee recognition, NAER sponsors a periodic review of nominees for “best practices” in 10 strategic categories, two of which are mandatory for basic consideration—any organization hoping to be a Best Practices recipient must meet them—and eight optional categories which differentiate and identify various elements of recognition expanding recognition beyond the basics. Individually, the results of the categories can have a substantial impact on an organization’s recognition success.

When fully implemented together, the ten elements will ensure a truly powerful and strategic recognition program for any organization.

The standards were developed based on exhaustive research, including findings from the American Productivity Center, the knowledge of respected recognition practitioners, recognition literature, case studies, selection criteria for *Fortune* magazine’s 100 Best Companies, *Working Mother* magazine’s 100 Most Family Friendly Companies, and to a degree, the Baldrige Award for methodology.

Organizations are either self-nominated or nominated by a third party. The selection of Best Practices companies is by a panel of independent recognition professionals, and is based solely on the Best Practices Standards.

It is important to note: NAER does not attempt to select one organization that fits all ten criteria. Rather, the attempt is to identify best practices individually. If no organization qualifies for a specific practice, none will be selected. If one organization is a leader in majority of categories, that organization is determined “Overall Best Practices”, as is the case this time for CalPERS. In 2002, only two companies were selected as representing best practices (17 organizations were nominated). In the future, as many as eight different organizations *could* be selected representing best practices of the eight optional categories.

Categories Overview

A basic overview—full criteria for each category may be found at www.recognition.org

1. **Management Responsibility (Mandatory):** Demonstrates that an organization's executives and management take responsibility for a well-defined recognition program and are committed to the program's objectives.
2. **Recognition System (Mandatory):** Demonstrates that the organization has established and documented a process(es) that promotes employee recognition at all organizational levels.
3. **Communication Strategy:** Demonstrates that the organization has established and utilizes an effective system to communicate all aspects of their recognition system.
4. **Behavioral Based Processes:** Shows that the organization has well-defined business processes and goals supported by employee values, matched to desired employee behaviors. The organization recognizes employees who exhibit these behaviors.
5. **Process/Program Measurement:** Demonstrates that the organization uses effective methods for measuring the success of various recognition initiatives.
6. **Process/Program Goal Alignment:** Shows that recognition goals are aligned with their organization's values and goals.
7. **Recognition Training:** Demonstrates that useful and effective training takes place enabling employees at all levels to understand and practice successful recognition.
8. **Celebrations/Recognition Events:** Shows that the organization has processes in place for organizing celebrations and events, provides necessary resources for events, documents the event, and uses creativity and uniqueness in these events.
9. **Employee Participation & Satisfaction:** Demonstrates that the organization's employees are engaged in and participating in their established recognition system(s). The organization must also be able to show that employees have a substantial degree of satisfaction with the organized recognition efforts.
10. **Process/Program Change & Flexibility:** Shows that the organization's recognition programs can be easily adjusted to meet new goals as the organization changes, or as different needs arise.

Sample Evaluation Sheet—
*representing the evaluation process used by the Selection Committee in
determining best recognition practices*

	Strongly agree 4	3	2	Strongly disagree 1	N/A
4.5 Process/Program Measurement					
1. The organization demonstrates how recognition processes or incentive programs are measured for effectiveness.					
2. The recognition processes or programs have established measurement indicators or tools.					
3. The measures are statistically valid and substantive in nature (examples include nominations per communication dollar, program participation level, productivity increase per recognition dollar)					
4. There is at least one year of data.					
5. There is evidence that the measures are reviewed periodically and used to manage the program.					

Describe how the executive management and/or designated staff person fulfill the requirements of this standard.

What makes this organization a best practice in the area of process/program measurement?

CalPERS Case Study—Overall Best Recognition Practices 2002

- Best Behavioral Based Process
- Best Process/Program Measurement
- Best Process/Program Goal Alignment
- Best Celebration/Recognition Events
- Best Employee Participation/Satisfaction

Building Rock Solid Performance— *It's Beneficial!*

Imagine you work at CalPERS. Your job might be behind the scenes, processing the myriad forms that ensure over 3 million members and their families receive their health, retirement and death benefits. You may analyze investments, sort mail or help with recruitment. Or, you might be on the “frontline,” manning a regional customer service office, handling public affairs or answering hundreds of member questions a day in a call center.

Whatever job you do, your efforts have a direct impact on your customers, both internal and external. And because of corporate culture, you know your work is valued—that you are part of CalPERS overall success.

It hasn't always been this way. In 1996 when CalPERS conducted their first employee survey, scores regarding morale, communication, recognition, and feeling a “part of the success of the organization,”



Facts & Figures

Established in 1931, The California Public Employees' Retirement System (CalPERS) manages pension and health benefits for nearly 3 million California public employees, retirees, and their families.

- Employees: 1,500
- Ownership: Government Agency
- Headquarters: Sacramento, CA
- 2001 Revenues Totaled: \$10.2B; Assets managed exceed \$160B
- Largest public pension fund in the U.S.A.
- **Recognition Staff: 1 full time, plus 13 Recognition Advocates (supervisors who spend 10% of their time on recognition)**
- www.calpers.com
- CalPERS' broad definition of recognition: “Anything you do to show someone you respect them as a worthwhile human being.”

were low. Leadership knew that CalPERS was headed for radical

re-engineering to improve out-dated processes and technology—as well as customer service quality.

It was critical that everyone buy into the mission, vision and values and operate at peak performance levels. It became obvious that a recognition strategy to support an ambitious but well-crafted business plan had to be formulated, executed, and maintained. The journey to a recognition-based culture has spanned years and has included input from CalPERS' staff at every milestone along the way.

Today, every department in the organization *benefits* from a well-designed, three-dimensional model—a fact proven when the 1,500 employees of this customer service organization rated recognition the number one aspect of working there!

**When The Benefit You Want Is
The Benefit You Need**
*Program Background &
Management Support*

Six years ago, CalPERS employee survey results indicated

All The Pieces—Unrehearsed!

Steven Pietrowski manages CalPERS' Fresno office, 175 miles away from the organization's headquarters, far enough to ensure that any recognition directive from HQ would need to be well planned and meaningful in order to be effective.

Pietrowski nominated his five-member Fresno field office team for the organization's top award: the APEX. (The Selection Committee named 20 recipients out of 80 nominations). His remarks on the experience reflect how the behaviors for categories are *practiced* and experienced at CalPERS.

1. **Behavioral-based Process.** "First and foremost, I recognized them for their commitment to the CalPERS Core Values."
2. **Process/Program Measurement.** Not applicable.
3. **Process/Program Goal Alignment.** "The 'word' out on the street is that CalPERS is a wonderful place to work—and it is! These programs offer incentives to all employees to strive to do their very best each and every day. Being recognized by your coworkers is a confidence builder for all employees and especially those who are not accustomed to receiving well-deserved praise for a job well done."
4. **Celebration/Recognition Events.** "The culminating event for the 2001 APEX recipients was a formal luncheon held in their honor. Participating in this luncheon was Mr. Burton (CEO) as well as various CalPERS Board Members and Division Chiefs. This was an up-close and personalized event—I am still and will always be impressed!"
5. **Employee Participation/Satisfaction.** "Until my employment with CalPERS, I had never been associated with or have heard of an organization that holds its employees in the highest regard and proves this with a variety of meaningful recognition programs. The CalPERS recognition programs are extremely valuable to me as an employee for a variety of reasons...it is an honor to be associated with an organization that is not only the leader in its industry; it is a leader in the appreciation of its employees."

Mr. Pietrowski responded without knowing of the Best Practices categories, demonstrating the depth of the program's reach.

that employees wanted more recognition for their work. Programs in place at the time were cumbersome, formal, and limited the number of recipients. Without official direction or training, daily recognition was rare. The survey showed recognition was the *least* valued aspect of working for the organization. Worse, factors such as wage freezes and increasing workloads were creating morale issues, making it even harder to sustain performance—a spiral that can devastate a business.

Luckily, senior management saw the need to examine CalPERS recognition practices, and enlisted Debbie Bennett, CalPERS' Labor Relations Specialist, to lead the effort.

"As an HR professional, I've always understood the importance of fostering a supportive, values-driven work environment," Bennett notes. "However, the focus on recognition as a *key business initiative* began in 1996 on the heels of a strategic organization-wide, grass roots effort to establish CalPERS' core values."

Bennett's best practice research led her to contract with an outside consultant, Dee Hansford (former Recognition Manager at Walt Disney World), to help guide the process. After telephone interviews with executives and focus groups involving nearly

10% of the workforce, the message from employees was clear: we want to be appreciated on a timely and consistent basis for meeting everyday challenges.

"This research prompted efforts to rethink our existing recognition program which was a very formal, top-down process," Bennett explains. "Best practice research pointed to several companies who were leading the way with innovative, multi-dimensional programs."

"When presented with an overview of the potential customer service and bottom line impacts of improved recognition, Jim Burton, CEO of the organization, quickly came on board as the champion of employee recognition," Dee Hansford recalls, highlighting the importance of converting an organization's senior leader and gaining not only their support, but their commitment to *participate*.

"Jim has been a role model and spokesperson in every conceivable communication vehicle—videos, forums, brown bag lunches with employees, and newsletter articles," notes Heidi Evans, who serves as Recognition Program Coordinator at CalPERS. "He continues to be a role model for recognition at CalPERS."

Behaving in Beneficial Ways

Behavioral Based Process & Goal Alignment

Webster defines “benefit” as 1: an act of kindness; 2: something that promotes well-being. At CalPERS, recognition happens for both of those reasons—and especially because the well-being of employees ultimately impacts the bottom line. After all, with 3 million individual customers and only 1,500 employees to handle them, it’s *crucial* that all employees perform efficiently and effectively.

In 1998, a cross-functional team, called C-STARS (including representatives from CalPERS’ Communication, Customer Service, Training, Change Management, and Recognition functions), was formed to determine what recognition should look like at CalPERS—how to make it a key part of the organization’s culture, and what behaviors needed to be impacted. The team forged clear links between CalPERS’ core values, critical performance behaviors and business objectives, and multi-dimensional recognition.

They aligned recognition with key business initiatives and leveraged communication about it across the organization. They began with the basic premise that recognition is “anything you do to demonstrate respect and value for another

person.” Now, when an employee sees another exhibiting behaviors that continually meet or exceed expectations—based on values, mission, and business strategy—they are empowered to provide the appropriate level of recognition.

“We have established core values in our organization that we live by every day,” explains Renee Ostrander a manager in the Benefit Services Division. “When we recognize [each other], we are encouraging behaviors that support our core values and our business goals.

CalPERS Core Values

- **Quality:** Strive to meet the customer’s needs through innovation, competence, and teamwork. Seek to “do it right the first time.”
- **Respect:** Sensitive to the needs of others, both within and outside the organization. Courteous, considerate, responsive, and professional.
- **Integrity:** In all endeavors, act in an ethical, honest, and professional manner.
- **Openness:** Willing to listen to, and share information with others. Receptive to new ideas. Trusting.
- **Accountability:** Take ownership and responsibility for actions and their results. Accept both risks and rewards, trusting that good faith risks will not be punished.

“There are values that make our culture unique and appealing to a highly trained workforce,” notes Steven Pietrowski. “In my opinion, our highly motivated workforce willingly fosters and embraces our values.” And where does recognition fit? “Our culture is better defined

today—due in part to the *recognition* of individuals who are doing their best to foster and embrace our culture.”

Benefits in 3-D...Special Glasses Not Required
Recognition Program Overview

In addition to encouraging constant, positive, personal feedback, CalPERS recognition program includes three levels of recognition based on a consistent, **three-**

dimensional model. Dimension 1: Day-to-day feedback. Dimension 2: Informal recognition. Dimension 3: Formal recognition. All dimensions work *from and to* employees at all levels of the organization.

“I’m excited that in the short span of a few years we’ve taken recognition from among the lowest to the highest valued reason to work at CalPERS”—Deputy Executive Officer Jim Gomez

<p>Dimension 1, Day-To-Day: Rocks & E-Rocks</p> <p>This program is simple: verbal or written positive feedback. Rock-shaped note pads and rock-themed e-cards are just two of the tools provided to staff to quickly and easily recognize any other employee or team. “You Are A Rock” note pads are distributed company-wide, and may be reordered. The day-to-day tool was launched using a theme video showing management and employees “rocking out” to the pop tune <i>Solid As A Rock</i>. “Rocks,” as the notes are known, practically serve as wallpaper in many employees’ cubicles.</p>	<p>Dimension 2, Informal: “The Rock” Pass around Award</p> <p>This dimension ties symbolic mementos and celebrations to “just in time” recognition and includes organization-wide and division-specific awards. The pass around rock trophy was created to recognize exceptional internal customer service. It was first presented to IT management for their support of the team during the arduous Y2K changeover, which occurred during Father’s Day weekend. Managers and supervisors provided food, videos, even sleeping bags for the long hours “tedious testing.” More importantly, they worked side by side with their teams.</p> <p>To continue the tradition of the pass around rock, they were instructed to find an appropriate moment to recognize another team or individual for above and beyond customer service. Whereabouts of “The Rock” are always known through the organization’s newsletter and intranet.</p> <p><i>“The short-term [impact of receiving the traveling ‘Rock’] was a feeling of walking on clouds for the rest of the day. The long-term impact was heightened respect for our...program. It seems like people took our business requests more seriously after we received the award because the award reflected well on our division’s performance. Our pictures were in the local newspaper because of an article about recognition at CalPERS, so I got congratulatory calls and emails from people I had worked with...before coming to CalPERS.” -- Rebecca Groner Information Systems Analyst, co-recognized with teammate Diane Morono.</i></p>
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<p style="text-align: center;">Dimension 2, Informal: A.C.E. Award</p> <p>Even the CEO has been nominated for this award, and proudly wears his lapel pin. In contrast to “The Rock” pass around award, this recognition has specific criteria linked to communication skills—a crucial element in a customer service-driven business:</p> <p style="text-align: center;">Criteria (must meet one):</p> <ul style="list-style-type: none"> ▪ Demonstrates and encourages two-way communication ▪ Takes personal responsibility for being informed ▪ Effectively communicates in all directions ▪ Actively supports the communication plan goals and objectives of their division or office <p><i>“I have always prided myself in creating my own measuring stick to guide me, but to be recognized by fellow staff is quite an honor. The ACE award was a surprise...when I received my ACE award there was [a staff member] taking pictures. I still have those pictures at my desk and look at them from time to time.”—David Rubio, Staff Services Analyst, ACE award recipient, confirming the long-term value of a tangible award and/or event photos and memorabilia.</i></p>	<p style="text-align: center;">Dimension 3, Formal: APEX Award</p> <p>APEX is CalPERS’ highest level of recognition. The annual process enables employees (individuals or teams) to be nominated by any employee for being role models of “all around” excellence. The award recipients(s) are selected by a multi-departmental committee of volunteers, based on <i>very</i> specific criteria. Recipients receive a crystal trophy (presented in front of entire workforce), a cash award, and a luncheon with their managers, the CEO, senior executives, and appropriate guests. They are also honored in a video about each of the recipients, shown at the luncheon. The award was launched in 2001, and received 80 nominations. 20 recipients were selected. During 2002, 57 nominations were received and 24 APEX recipients were selected.</p> <p><i>“I feel very proud to have an APEX award. I’m responsible for continuing to make a positive contribution to CalPERS success as well as to the everyday lives of the people I work with.” –Grace Cowan, 2001 APEX award recipient</i></p>
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The Benefit of Measurable Results
Process/Program Measurement –
Employee Participation/Satisfaction

In the 1990s, the Harvard Business School directly tied employee satisfaction to customer satisfaction, loyalty, and profitability. CalPERS’ employee satisfaction ties those bottom-line aspects, in part, directly back to recognition:

- 18 months after program launch, survey results regarding recognition showed a 19% increase in employee satisfaction.
- Survey results also show recognition is the most valued aspect of employment at CalPERS. It was originally least valued.

- *Thousands* of “Rock” pads have been distributed to CalPERS staff, and the notes can be seen proudly displayed throughout the organization.
- Majority of senior management, managers, and supervisors have attended recognition skills training. 80% rate their ability to deliver effective day-to-day recognition between 8 and 10 (1-10 scale).
- Recognition is practiced at all organizational levels—over 1,000 front line staff have received recognition training.

- Demonstration of ROI—example: During a critical open enrollment period for members, management planned a high-energy, “baseball-themed” kick-off and sustained the recognition throughout the 12-week period through a variety of ways. There were “popcorn days,” a barbeque cooked and served by executive staff, on-site chair massages, even a sanctuary room with soothing music, aromatherapy and herbal teas.

The ROI of that strategic recognition during open enrollment was that staff processed *seven times* the normal workload with no additional staffing, worked every Saturday for 12 straight weeks and attendance was the best it had ever been. At the end of the period, camaraderie was high and attitudes excellent.

- While most California government agencies see double digit defections, CalPERS vacancy rate hovers at about 8.5%
- Bottom line impact: all measurable aspects of customer service (program enrollment time, length of calls, frequency of busy signal/wait) have improved substantially—all since recognition efforts have been improved.
- Customer complaints have dropped dramatically.

It’s important to note: success of the program is *not* based on dollars spent for recognition; success is based on ongoing improvements in customer service, productivity, and morale.

But when it comes to determining program success, “measurables” are only half the story. Comments from presenters and recipients alike tell the other half—

“The recognition meant more than the actual crystal award or the cash,” says APEX recipient Mark Viviano who works in public affairs. “Long-term impact—it improved my relationship with my coworkers and my manager.”

David Rubio adds, “You want to give more to the organization that recognizes the hard work you do to put forth a quality product or service. You try to raise the bar for yourself so that you will always be thought of in that capacity.”

Add this important thought from Renee Ostrander, and it’s apparent that participation in recognition is ingrained: “Recruiting a strong workforce like CalPERS has is difficult. Retaining them is even more difficult. Recognition goes a long way toward that goal. *It doesn’t cost much to write a small thank you note, but it can cost plenty if you don’t.*”

CalPERS People All Know How To Give Meaningful Recognition

All CalPERS employees understand the organization’s recognition program—and its connection to the organization’s goals and values—from day one. Every new employee is trained through a custom, 45-minute video—*Living Our Values*—as well as hands-on skills practice led by the Recognition Program Coordinator. Supervisors and managers are also updated and trained on recognition skills during various leadership classes.

It's Beneficial to Cheer!
Celebration/Recognition Events

The heart of CalPERS recognition comes in the smaller celebrations organized by various divisions and/or coworkers to shine the light on their colleagues—which are modeled and encouraged during recognition training.

Consider the effort of the Call Center Team during the 2001 benefits open enrollment season. “This time is labor intensive and stressful,” comments manager Doug McKeever. “Since the open period was nine weeks long, we created a baseball theme. Each week represented an inning and each week we recognized staff for their efforts.” Included along the way? A week with chair massage and a dedicated room called the “sanctuary” where staff could relax and re-energize with big pillows, herbal teas, and fresh fruit.

Or consider the day Renee Ostrander bought a play tiara for a coworker to make her “Queen” for the day—and announced it by email to 300 staffers.

Or the popcorn, \$5 Blockbuster cards, candy, and candles that Jill Kanemasu is always using to say “thanks.”

Some celebrations at CalPERS are “small,” such as a Unit potluck or a complimentary cappuccino break from one

colleague to another. Others, such as the annual APEX presentation and off-site luncheon are large, formal affairs.

Other formal events have included a “Recognition-based Year End Event at the Crest Theatre,” a celebration during National Customer Service Week in October, and a “Rock & Roll Shindig.” Each is a festive celebration featuring executive or management presentations tying people’s contributions to the organization’s success. Celebrations typically include videos, skits, and recognition for individual and team accomplishments.

The organization’s #1 recognition advocate is their CEO. But Jim Burton admits it wasn’t always easy being front and center. “During my many years in state service, I can count on one hand the number of times I was recognized—so I didn’t know how to give or receive recognition and wasn’t comfortable doing it,” the CEO explains. “When Debbie and Dee Hansford talked me into doing the *Solid As A Rock* video it took me way out of my comfort zone.”

Over time—and with practice—Burton has become much more comfortable recognizing others. “It’s important that we *all* practice day-to-day recognition,” he says, “it’s become the expectation at CalPERS.”

At CalPERS, every move of every employee every day is ultimately about benefits. After all, it's the organization's business.

But while heads are spinning about costs of health care plans and data surrounding pension funds, CalPERS employees are never too busy to offer each other the most important benefit of all: recognition.



EXHIBIT A

CalPERS APEX Award Criteria:

Demonstrated Commitment to Customer Service	Exceptional Technical & Interpersonal Skills & a Demonstrated Commitment to Self-development	Demonstrated Commitment to Core Values	Demonstrates a Commitment to the Overall Success of CalPERS
<ul style="list-style-type: none"> ▪ Sensitive to & anticipates customer needs and expectations ▪ Service oriented respects & treats customers fairly ▪ Responsiveness to all we serve – accurate, prompt service ▪ Desire to serve the public ▪ Exceeds customer expectations 	<ul style="list-style-type: none"> ▪ Strong technical skills ▪ Strong computer skills ▪ Strong problem solving skills ▪ Ability to do detailed work ▪ Multi-task oriented ▪ Efficient – adds value & provides quality ▪ Strong interpersonal skills ▪ Fosters/supports teamwork ▪ Strong communication skills ▪ Pursues continuous learning 	<ul style="list-style-type: none"> ▪ Professional ▪ Demonstrates openness ▪ Demonstrates respect ▪ Demonstrates integrity – ethical & honest ▪ Accountable – takes responsibility ▪ Innovative ▪ Highly motivated 	<ul style="list-style-type: none"> ▪ Understands individual role in supporting overall business ▪ Can be a leader ▪ Supports cross-divisional collaboration ▪ Plans and manages change ▪ Adaptable to change

Exhibit B

Questions about recognition as included on CalPERS employee satisfaction surveys in 1996 and 1999 (only recognition related questions are shown here)

Please rate CalPERS on how well it:

- a) Allows people to freely make constructive suggestions
- b) Implements employees' constructive ideas
- c) Provides people with opportunities to apply what they have learned
- d) Allows people to make mistakes as part of the learning process
- e) Encourages continuous improvement
- f) Provides training opportunities that may be useful for future positions within CalPERS
- g) Provides positive reinforcement and recognition

Rate : very good, good, fair, poor, or very poor.

How often do you give recognition to:

- a) Your immediate supervisor
- b) Coworkers within your division
- c) Staff outside your division

Rate: very often, fairly often, sometimes, almost never, never

Please rate your immediate supervisor on each of the following factors

- a) Ability to communicate
- b) Willingness to communicate
- c) Feedback concerning your job performance
- d) Fairness in treatment of employees
- e) Openness to new ideas
- f) Leadership ability
- g) Responsiveness to your needs
- h) Recognition of employee accomplishments
- i) Consistency in practicing CalPERS core values

Rate: very good, good, fair, poor, very poor

Overall, how satisfied are you with CalPERS on each of the following:

- a) As an organization to work for
- b) Being interested in the well-being of its employees
- c) Showing appreciation for the efforts of its employees
- d) Making efforts to have its employees work as a team to achieve common goals
- e) Serving its external customers
- f) Serving its internal customers

<p style="text-align: center;">CalPERS Summary What makes CalPERS best in these areas</p>	<p style="text-align: center;">How your organization can duplicate this</p>
<p>1. Best Behavioral Based Process—</p> <p>CalPERS identifies the behaviors they wish to recognize as those behaviors which support the organization’s core values and business initiatives. The organization’s core values were developed at the same time as, and in conjunction with, CalPERS’ re-built recognition efforts, making recognize-able behaviors easy to identify.</p> <p>For example, CalPERS identifies “Respect” as a core value, with “courteous” as a sub-category of that value. The values are published for all to see, so when a coworker consistently goes out of her way to be polite—never losing her cool with a client or teammate but treating all concerns with great respect—that behavior can be easily noted and should be recognized.</p>	<p>If your organization has identified specific values, goals, and behaviors, ensure that you include them in your recognition strategy—and make sure all communication & training identifies the values as recognize-able behaviors.</p> <p>A useful angle is to encourage day-to-day recognition when coworkers notice consistent application of the values, and more formal recognition when someone goes beyond expectations.</p> <p>If your organization has not outlined formal values, make this a priority. Involve people from a number of areas. Start with your mission statement, examine the kind of business you are in, and create a list of values and behaviors that support both the dignity of your people and the bottom line of your business.</p> <p>Provide recognition tools, like the clever “Solid as a Rock” note pads, that make it easy and fun for employees to recognize the key behaviors.</p>
<p>2. Best Process/Program Measurement</p> <p>CalPERS monitored business areas where a clear connection could be made from the time of implementing their upgraded recognition program, such as number of customer complaints and length of time required to enroll a client. This gives them a very clear return-on-investment.</p> <p>Additionally, CalPERS measured the value—not just satisfaction—employees place on recognition, before the new program was launched, and over a substantial period after the launch. The 19% improvement in value is substantial. The fact that “recognition” went from last to first in valued aspects of CalPERS employment is extremely important in reviewing program effectiveness.</p>	<p>If your program is tied to specific values and behaviors, as explained above, it should be quite straightforward to measure its effectiveness over a period of time—provided you measure the behaviors before a new recognition initiative or program is launched.</p> <p>It is also useful to include questions about the value employees place on recognition/appreciation during employee satisfaction surveys. If you face resistance to this because your organization uses a survey developed by an outside firm for benchmarking that doesn’t include recognition, insist that recognition questions still be included, and simply be separated from the benchmarked portions.</p>

<p>3. Best Process/Program Goal Alignment</p> <p>The goals are very closely associated with CalPERS values and business initiatives—and are based on critical behaviors and performance factors that mirror those concepts. For day-to-day recognition, the goal is clear to those who understand the values and learn the business initiatives.</p> <p>For more formal recognition, such as the ACE and APEX awards, specific goals and criteria are outlined.</p>	<p>Give your recognition program clear goals, and tie them to your organization’s values and business initiatives. While it may seem easier at an organization like CalPERS where customer service goals are easily measured, every business has measurable aspects. Even at CalPERS, measurables vary from department to department. But every department is still obligated to operate according to the values.</p>
<p>4. Best Celebration/Recognition Events</p> <p>The clear tie to the organization’s values, along with the level of participation by senior management—both financially and personally—really makes CalPERS events stand out.</p> <p>For example, the “Rock ‘n Roll Shindig” was tied to CalPERS two “rock” themed awards. Senior management were very involved in all aspects of the event, and made it very clear that they were recognizing the organization for “exceptional performance during an intensive period,” when the employees had processed hundreds of thousands of client files allowing clients to benefit from new government regulations.</p> <p>Not only are events like this fun, but tying them to specific values and goals makes them very worthwhile, memorable, and meaningful.</p> <p>All major events are recorded on video.</p> <p>Additionally, CalPERS empowers managers and employees to have appropriate celebrations recognizing excellent work—without any bureaucracy, as long as the celebration or award is within certain budgetary guidelines.</p>	<p>This is the part of recognition people love. It’s the “personal touch” that emphasizes the strategy behind a recognition program.</p> <p>Ensure that when a company-wide celebration is planned, senior management is on board from the beginning. Make sure they understand the reason for the celebration: that someone—an individual, team, or the entire organization—did something that impacts the organization’s bottom line because it ties to the values and goals.</p> <p>When you plan a major event, tie it to a theme your organization has going, or to something seasonal (such as CalPERS “9 Innings” event), if it seems appropriate. But don’t force people to have “fun. . .” let people participate at a level they’re comfortable with (not everyone likes to wear a Hawaiian shirt or sing the company song).</p> <p>More importantly, and regardless of the size of the celebration or number attending, make sure all employees understand that the individual, team, or group is being recognized for an accomplishment tied to the values of the organization.</p>

<p>5. Best Employee Participation/Satisfaction</p> <p>CalPERS is able to quantitatively determine participation and satisfaction in a number of ways.</p> <ul style="list-style-type: none"> ▪ Employee satisfaction survey results before and after changes in program ▪ Quantity of recognition materials used/requested ▪ Program-specific outreach efforts, including “just in time” surveys and informal communication workshops ▪ Anecdotal experience throughout the organization. 	<p>This item is similar to “program measurement” above. Ensure that you have regular, formal feedback methods for employees to voice their satisfaction.</p> <p>TALK to people throughout your organization. Every time someone calls you, no matter the purpose of the call, ask them how they’re using recognition, or if they’ve been recognized lately.</p> <p>If your program uses small recognition items such as cards or e-cards, monitor quantities used.</p>
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TELUS Cases Study—Best Recognition Practices 2002

- Best Recognition Communication Strategy
- Best Recognition Training
- Best Process/Program Change & Flexibility

Crystal Clear Communication

There are a lot of phone signals floating through the air. But while you're deciding if you need digital or analog, satellite or DSL, Canadian communications giant TELUS is sending a signal of a different sort—one that won't get lost in an elevator or tunnel.

It's a signal that goes out loud and clear to TELUS' 30,000 employees: *you are a highly valued part of this team*. It's a message that is sent by senior management, and is retransmitted thousands of times each day by managers, team leaders, and peers.

TELUS CEO Darren Entwistle is a recognition manager's dream boss. He is a leader who truly understands that a company's bottom line is *completely* dependent on the attitudes and efforts of every employee.

"It's people that execute strategy," he says, "and it's the people that create shareholder value."

Kendra Innes, Director of Performance Enhancement and Recognition at TELUS,

explains that Entwistle drives the organization's recognition culture from the top down. "Darren's consistent message to the financial community and to TELUS employees is that our people are our competitive advantage," she says. "As champions of the recognition culture, Darren and his executive leadership team model these behaviors and support the recognition culture from both financial and philosophical perspectives."



Facts & Figures

TELUS Corporation is one of Canada's leading communications companies, providing a full range of communications products and services for Canadians at home, in their workplace and on the move.

- Employees: 30,000
- Ownership: Publicly held
Headquarters: Vancouver BC
- One of "Top 10 Companies To Work For In Canada"
- 2001 Revenues: US \$4.61 Billion (apx.)
- **Annual Recognition Budget: US \$4.1 Million**
- **Recognition Staff: 5 full time**
- www.telus.com

This phenomenal level of support from TELUS senior management has, in a very short period, allowed a recognition culture to develop that truly sets the standard for best practices in three areas of employee recognition.

From Analog to Digital
*Program Background &
Management Support*

TELUS grew out of a variety of smaller telephone companies—some going back over a century—into a major player in Canada's rapidly growing wireless and Internet industry. In 2000, Entwistle's senior management team was assembled to meet new competition with a more market driven strategy.

"Darren understands that every TELUS employee makes a valuable and unique contribution to the success of our organization," Innes notes. "Unleashing the potential of our people by tapping into the power of positive reinforcement (recognition) is vital to capturing the discretionary effort of our employees."

Entwistle knew the only way to keep the organization focused on those goals was to offer TELUS employees a workplace brimming with opportunity and positive experiences. As a key part of the strategy,

Entwistle required a top shelf process for encouraging positive behaviors.

And TELUS' recognition effort was reborn.

To build a new culture of recognition, a team of employees was assembled under the leadership of Kendra Innes to determine what the program(s) should be.

"We set out with the goal of establishing a recognition program at TELUS that is unique," she says. "To start down this path, we needed to understand what worked well—and what didn't work well—in other organizations."

Innes and her team used a combination of industry benchmarking, internal employee input, and management input to determine the elements that would combine to create a program that met everyone's needs and wants. Most importantly, it needed to be a program that communicated a clear message to TELUS employees during a time of high competition mixed with fast-paced industry change.

Recognition Program Objectives

Through the group's research four objectives were determined for the program:

1. To provide a consistent, company wide recognition system that is simple in process, yet rigorous in application

2. To recognize and reinforce behaviors that support corporate values and strategy while driving performance
3. To ensure that employees feel their accomplishments are recognized and appreciated
4. To foster a recognition culture throughout the organization

Satellite Signals & Handshakes
Recognition Communication Strategy

“Communication is what recognition is all about,” says Kendra Innes. “It’s communicating TELUS’ values, communicating the behaviors needed to support our business success, and employees communicating to each other that their efforts and contributions are appreciated.”

Communication was crucial in launching TELUS’ recognition efforts, and continues to be a key topic at many company meetings, including CEO Entwistle’s frequent Front Line Leaders’ Forums, where he meets with approximately 50 leaders in an intimate setting.

“Darren has been the ‘public face’ on many of our communication activities,” Innes says. “In this role, Darren not only communicates the importance of a recognition culture at TELUS, he also models the behaviors that we need from all employees.”

And being able to put all recognition communication under the CEO’s name certainly has power.

As a leader in the communications industry, it’s no surprise that every TELUS employee is wired to the nines, and the recognition team takes full advantage of that fact. Many aspects of recognition are handled via the Internet and TELUS’ intranet.



Make It Memorable

The name “Team Machine” applies to much of TELUS’ informal recognition activities. It was selected to help employees in a wide variety of locations—many who had been absorbed into the company by acquisition of other companies—gain a sense that they are all part of one large TELUS team. The program uses a fun, whimsical car rally theme.

“This theme was chosen because it communicates...our high performance culture—teamwork, achievement, participation, motivation, and fun,” Innes explains.

Additional communication takes place in many forms:

- CEO emails to all employees including “Hats Off” recognition to deserving employees
- Themed mouse pad given to all employees

- Posters in all offices
- Video and information package to all leaders
- Introductory letter from CEO
- Ongoing manager training
- Public celebrations
- Public communication through CEO presentations to business and community
- All communications produced in English and French, Canada's two official languages

"The [recognition] process had a great website. Clear, concise, quick, and very functional," notes Sheldon Rideout of TELUS' Network Test Division. "I became aware of the program through company email communications indicating that the recognition program was changing. Enough information was provided to make the process easy."

Enough Phone Talk...Let's Meet In Person *Recognition Training*

Team Machine's communication plan ensures that all employees are aware of the program, which sets a certain level of expectation for presentation quality.

Innes and her team have developed online, video (a highly entertaining production in the style of TVs *Survivor*), and in-person (using *only* recognition team members to ensure quality) training packages.

Our hat goes off to...

Norm Shier, Nanaimo B.C. technician who dangled out of a helicopter, 150 feet above the water, to untangle a fiber optic cable from hydro lines. Thanks, Norm. I would certainly call that going above and beyond! –CEO e-letter, July 9, 2001

While technology has its strengths, it's the "in person" training that has the biggest impact.

Early in the launch of the new recognition initiatives, Kendra Innes decided to take the show on the road. She developed a very clear strategy for meeting with management teams at TELUS divisions across Canada.

In order to get through to mid-level management, Innes created recognition training that focuses on the bottom line.

"I communicated to them that recognition—when it's done right—is *critical* to our success," she explains. "And I never present it as "touchy-feely," I present it as a clear business strategy."

On her first trip, Innes had no idea what a phenomenal response she would get. Today members of the recognition team are regularly on the road, scrambling to keep up with the number of requests for their tightly packaged, one hour recognition training session—a demand fueled largely by word-of-mouth. "It's clear from the number of requests we get for these presentations that we have identified a customer need," she

notes. On average, presentations are made twice a week, and have impacted over 420 senior level managers since July of 2001. In-person training emphasizes:

- Importance of recognition as a strategic tool in changing behaviors—utilizing the “ABC” theory of performance management (see Exhibit C, page 29)
- Developing performance through recognition
- Leaders’ roles as recognizers in modeling desired recognition behavior
- The advantage of a recognition culture

The training programs are already showing high ROI through an energized workforce, top down support, and increased recognition participation at all levels of the organization.

No Busy Signal Here!

HR specialist Vicki Kaufman, received a surprise Turbo Charge award during a large group-training meeting. Between training activities, the department’s Executive VP asked Vickie’s manager to step forward...illustrating in front of 80 coworkers that even an executive is never to busy for recognition. “In my head I was saying, ‘Finally Susan (Vicki’s manager) is getting the recognition she deserves,’” Kaufman recalls. Then Kaufman was called forward and was the one recognized. “I am appreciative of the efforts that were made on my behalf that day, and the time taken to make me feel special. I did.”

With the basics of recognition taught, no official direction is given on how recognition

should be presented—except to make it sincere.

“At TELUS, we like to acknowledge accomplishment personally and appropriately,” Innes explains, “therefore presentation style is left to the manager’s discretion.”

Additional training is provided to managers prior to an employee’s long service award presentation, which TELUS calls “Career Excellence.” Each manager receives instructions on how to make the event important and meaningful (See Exhibit B, page 28).

A “Rate Plan” for Everyone!

Process/Program Change & Flexibility

Team Machine provides multiple platforms for TELUS employees to recognize each other’s achievements. Recognition may be given by anyone to any individual, or to an entire team.

The online aspect of most TELUS award programs makes them exceptionally flexible and easy to change.

The recognition team has responded to employee feedback by implementing many changes since the program’s beginning, such as streamlining forms, creating new e-cards, allowing managers to see full reports of their employees’ Team Machine usage, etc. They

have even added unique categories to reward employees who save the company money when traveling, or closes an outstanding sale. Over 50 enhancements were made to the program in the period of one year.



Completing the Call

"[TELUS Recognition] is a wonderful tool!" exclaims Vickie Kaufman. "It's available to all members of the TELUS team. It offers everyone the opportunity to take a moment and recognize a peer, manager, employee, or internal customer. It's often the small gestures—the quick 'thank you' or pat on the back that get us through day to day. Team Machine (the online component of TELUS recognition) also puts the larger gestures at your fingertips. It's friendly, efficient, and combines all the components of personal touch, user friendliness, and face-to-face delivery of formal awards."

There's no question that TELUS has raised the bar on recognition communication, training, and flexibility. Management is pleased with the results—so pleased, in fact, that they've given the recognition team a 5% budget increase for 2002. Without senior management's incredible support—both financial and in practice—TELUS recognition would still be in the analog age. However, it's important to note that any company of any size, and with a much smaller budget, could duplicate much of what TELUS' recognition does.

Innes recommends continually focusing on the *strategy* of recognition, so that executives, managers, and front-line

employees can see how it ultimately benefits a company.

And don't forget the words of Darren Entwistle: "People are the heart of who we are and what we aspire to be as an organization,"

Get your CEO to agree to that, show him TELUS' phenomenal results in terms of their annual growth, and send TELUS a thank you note for making your job clearer and easier.

TELUS VALUES

- *We embrace change and initiate opportunity*
- *We have a passion for growth*
- *We believe in spirited teamwork*
- *We have the courage to innovate*

Our values form the basis of everything we do at TELUS—how we think, act, make decisions, and behave.

TELUS employee Dave Krug says TELUS recognition has greatly impacted him during just 1.5 years at the company. He's already received one Accelerator award, three Turbo Charge awards, and one Pace Setter. "Most days you go through the day just doing your job," Krug notes. "...but when you are recognized by the people you work with, those are the better days."

And Krug says that ultimately, being recognized publicly does exactly what management everywhere hopes for. Receiving the Pace Setter award publicly "was a great forum to hear about other successes in other TELUS groups," he explains.

Exhibit A

TELUS Team Machine Award Structure

There are four levels in the Team Machine arsenal of recognition options, each named to tie into the racecar theme:

<p style="text-align: center;">Level 1: <i>Spark Plug</i></p> <p>Informal, No Cost/Very Low Cost, No Administrative Effort</p> <p>Spark Plug awards are e-cards providing instant recognition. Any employee can send a personalized Spark Plug e-card to any other employee without any management approval. When a manager sends a Spark Plug to a direct report, they have the option to award 100-300 Team Machine Points.</p> <p><i>Goal: Every employee receives one or more annually</i></p>	<p style="text-align: center;">Level 2: <i>Accelerator</i></p> <p>Modestly Formal, Low Cost, Minimal Administrative Effort</p> <p>Any employee may nominate any individual or team for this award, which includes a certificate and 1,000 Team Machine Points. The nominee's manager must approve the nomination. The nomination process is completed online, and may be used to recognize any employee or team that fits all of the following:</p> <ul style="list-style-type: none"> ▪ Consistently demonstrates one or more TELUS value ▪ Performs their job consistently well ▪ Exhibits behavior above and beyond normal expectations ▪ Positively impacts customers, other employees, or the company as a whole <p><i>Goal: 40% of workforce receives annually</i></p>
<p style="text-align: center;">Level 3: <i>Turbo Charge</i></p> <p>More Formal, Moderate Cost, Minimal Administrative Effort</p> <p>Any employee may submit an online nomination for any individual or team for this more significant award. Turbo Charge includes a certificate, and 3,000 Team Machine Points.</p> <p>The award is for any employee/team who</p> <ul style="list-style-type: none"> ▪ Consistently demonstrates <i>all four</i> TELUS values ▪ Always performs their job well ▪ Demonstrates <i>extraordinary</i> effort ▪ Positively impacts customers, other employees, or the company as a whole <p><i>Goal: 10% of workforce receives annually</i></p>	<p style="text-align: center;">Level 4: <i>Pace Setter</i></p> <p>Formal, Moderate Cost, Substantial Administrative Effort</p> <p>Pace Setters are selected quarterly from <i>among recipients of Turbo Charge awards</i>. Any individual or team may be chosen for this top honor, based on truly outstanding efforts and accomplishments. A cross-functional employee team reviews all Turbo Charge nominations to select the recipients.</p> <p>Recipients receive:</p> <ul style="list-style-type: none"> ▪ A symbolic Inukshuk glass sculpture, desirable and appropriate in Canadian culture, an Inukshuk card, and event memory card ▪ A congratulatory cocktail reception hosted by members of TELUS' executive leadership team, including a video about the significance of the Inukshuk ▪ A congratulatory voice mail from the CEO ▪ Written acknowledgement in the CEO's weekly all-employee e-letter <p><i>Goal: 2% of workforce receives annually</i></p>

Exhibit B

TELUS Career Excellence Presentation Guidelines

As part of TELUS' goal to be an employer of choice, we acknowledge the value of thanking employees for their contributions and loyalty over the years as a crucial element to our success.

First-class Career Excellence presentations can be easy and fun. They provide a meaningful opportunity to convey to a TELUS team member their value to the organization and to recognize their contributions to our business goals.

Although the tangible award may have significance, it is the presentation that has the power to turn a mere gift into a momentous token of TELUS appreciation.

Our Career Excellence Program can only be successful when we consider the diversity and individuality of each and every team member at TELUS.

Employees want their presentation to be first-class and the presenter wants the process to be easy, yet meaningful.

Career Excellence Guidelines

All Anniversaries: A celebration of service milestones should include a presentation of the Career Excellence gift and an opportunity to involve co-workers and other employees whose presence is considered important to the recipient. Select an appropriate time and date and provide snacks and refreshments.

25 & 30 Years: In addition to the workplace celebration, employees should be offered a luncheon or gift certificate with a suggested value of CDN \$60-80.

35 Years and above: In addition to the workplace celebration, employees should be offered a dinner or gift certificate with a suggested value of CDN \$125-150.

Retirement: Employees should receive some sort of presentation/social gathering.

It is important the celebration be meaningful to the employee. To ensure you understand what is meaningful for them, ask them if they would prefer a private celebration or a public celebration which involves their work area. Ensure they also have the opportunity to indicate if there are special people they would like invited. Realizing that every individual is unique, please respect their wishes or requests.

Presentation Tips

Here are a few suggestions to consider when planning a winning presentation:

1. Always consider the individual's preference. For example, would the individual prefer a private (one-on-one) presentation or a public presentation (co-workers present at celebration)?
2. Ask the employee if there are special people they would like invited to the celebration (spouse, a coworker from a previous work area).
3. Prepare in advance. Celebrate the event as close to the date of the anniversary as possible.
4. Invite others to assist in preparing and participating in the presentation.
5. Ensure the presenter shows his/her appreciation in a considerate and sincere manner (sometimes it is appropriate to have a co-worker or previous manager present to the employee).
6. Make it personal. Highlight specific accomplishments.
7. Be creative and have fun.

Exhibit C

The “ABC Theory of Performance Management”

As part of TELUS extensive recognition training effort, and the belief that recognition is not just a kind gesture, but a critical business strategy, the organization uses the ABC Theory, which is:

A: **A**ctivator—primary goal setting

B: Desired **B**ehavior

C: **C**onsequence—What happens after the behavior occurs

For more information on the ABC Theory, consult *Bringing Out The Best In People*, by Aubrey C. Daniels (McGraw-Hill Professional Publishing; ISBN: 0071351450; 2nd edition (December 21, 1999)).

<p style="text-align: center;">TELUS Summary What makes TELUS best in these areas</p>	<p style="text-align: center;">How your organization can duplicate this</p>
<p>1. Best Recognition Communication Strategy</p> <p>TELUS effectively uses their recognition-engaged CEO as the face and voice of much of the communication effort. The CEO is dedicated to including recognition—both in discussion and in practice—in his presentations to the TELUS team. This level of communication builds a greater likelihood that recognition will trickle down.</p> <p>Additionally, TELUS fully utilizes employee email and voice mail, as well as printed documents.</p> <p>All communication carries a consistent message, and generally is tied to the organization's recognition theme, "Team Machine," fostering a culture of recognition throughout the organization.</p>	<p>Use your recognition program as a tool to communicate and reinforce organizational goals and values. The key is to get your senior leader engaged—not just interested, but actually participating. When the CEO regularly talks about recognition, and publicly recognizes those around him/her, you achieve recognition communication at the most effective level.</p> <p>But, not every CEO is game. If you can't seem to get recognition on the CEO's radar screen, work at the highest level you can.</p> <p>Create a theme for your recognition efforts that tie to your organization's style, culture, and goals.</p> <p>Utilize whatever technology you can. If you don't have a dedicated intranet site, befriend someone in the I.T. department for help in building one.</p> <p>If your senior leader is willing, get them to do a weekly "great job" message on 15 people's voice mail. Or, get them to pre-record several messages, and send them to employees as appropriate. Do the same with email.</p> <p>Utilize any print or e- newsletters your organization produces.</p> <p>Don't be afraid to have fun with your recognition theme. Make it inviting and playful.</p>
<p>2. Best Recognition Training</p> <p>TELUS recognition training reaches both broadly and deeply into the organization. Within one year, 420 upper-level managers received in-person training. Such training sessions focus on recognition as a <i>business strategy</i>, as well as the details of TELUS' recognition programs. TELUS' recognition team has opted to handle all the training rather than passing it off to their training department, ensuring that recognition is properly taught during the program's very crucial early years. Feedback and continued requests from various divisions</p>	<p>Incorporate recognition training as a key component in your overall recognition program. Include the principles of recognition and positive reinforcement in the training curriculum.</p> <p>Look for opportunities to include recognition in existing day to day business. Any time you see a management meeting on the schedule, ask for time to train on and <i>give</i> recognition.</p> <p>Teach how recognition is a <i>strategy</i>, not just a warm gesture or a program. Show how it connects with your company's values, and teach that it is a necessary tool in effectively managing.</p>

<p>validates the effort.</p> <p>Training sessions focus on how managers can use the Team Machine program as a recognition tool. More importantly, it discusses recognition as a businesses strategy. Elements include:</p> <ul style="list-style-type: none"> ▪ recognition as a corporate and performance management initiative, ▪ the theories of positive reinforcement ▪ manager’s role as a leader in modeling recognition; and ▪ the relationship between recognition and TELUS’ overall business goals and strategy <p>TELUS’ recognition team has opted to handle all the training rather than passing it off to their training department, ensuring that recognition is properly taught during the program’s very crucial early years. Feedback and continued requests from various divisions validates the effort.</p> <p>Additionally, TELUS has produced printed training materials, online guidelines, and exceptional video materials which are informative, entertaining, and value-driven.</p>	<p>Utilize technology for training—such as your intranet and videos—but don’t let them take the place of in-person training.</p> <p>Use the recognition “pack and go” approach. Package your recognition training so that it is short, useful, and to the point.</p>
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3. Best Process/Program Change & Flexibility

The recognition team closely monitors all aspects of the program, and regularly solicits feedback through a variety of channels — external and internal employee satisfaction surveys, etc. They also accept suggestions.

As appropriate, the recognition system is changed or augmented to meet emerging needs. Since TELUS employees are all wired to the intranet, program change is exceptionally easy to communicate.

TELUS' main recognition system, Team Machine, is entirely online, allowing for instant change to the program.

The flexibility of TELUS' program has allowed for over 50 official changes in a one year period—everything from simplification of forms and nomination processes, to adding official recognition for special categories like saving money on travel by staying over a weekend.

If your organization is well-wired (all people have intranet/Internet access), it's easy to make program changes and communicate them.

But not all organizations have this luxury.

You can still have an adaptable program by printing smaller quantities of communication materials.

The most effective way to keep a program adaptable is to have criteria that are narrow enough to be clearly visible, while broad enough that you can add unexpected categories within your existing program.

For instance, if you had a program that awarded a ½ day of free vacation as part of a semiformal award for customer service, it would be easy to add in people who are complete a substantial team project ahead of schedule.

Simply make sure that any change is communicated to the entire organization—and that you *recognize the person(s) who suggested the change!*

C R E D I T S

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